

# EXPAT ADVISORS COMMUNITY



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# Delegate Profiles

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## **Australian Financial Services and Business Mission**

[Hong Kong 15th to 20th January, 2017](#)

**Mission Leader**

**STACEY MARTIN, Founder**

**Expat Advisors Community**

[www.expataadvisorscommunity.com.au/aff2017](http://www.expataadvisorscommunity.com.au/aff2017)

## Welcome Message from Mission Leader, Stacey Martin

I am delighted on behalf of Hong Kong Trade and Development Council (HKTDC) to be leading the 8<sup>th</sup> annual mission to Hong Kong, having attended since 2013 with Think Global led by David Thomas, who has entrusted me with the mission going forward.

Our 2017 delegation consists of representatives from the Australian Financial Services and Business communities representing Funds Management, Risk Management, Significant Investor Visa (SIV) migration, expatriate services and a range of investment projects from property to agriculture and businesses in entertainment and disruptive services. We are looking to gain insights and explore opportunities with local industry participants and those looking to invest or do business in Australia.

During our week in Hong Kong, delegates will attend the Asian Financial Forum on the 16<sup>th</sup> and 17<sup>th</sup> of January, 2017 as well as other activities during International Finance Week including the Family Office Solutions Showcase and the InvestHK “Start-Me Up” Festival.

In addition, we are pleased to be partnering with the Australian Chamber of Commerce in Hong Kong attending their Mix at Six, an event and evening at Sha Tin Races with The Hub Children’s Charity and with the week culminating in the AustCham Australia Day lunch on Friday 20<sup>th</sup> January.

We would also like to acknowledge Carolyn Butler from The Hong Kong Trust Company for her assistance on the ground, especially hosting our delegation with tailored sessions from industry participants and an evening Junk Cruise on Hong Kong Harbour.

Financial Services are a key objective for the Australian government, especially with the recent China Australia Free Trade Agreement (ChAFTA). We are pleased to have the support of the Austrade who’s key objectives from a financial services perspective include the internationalisation of the RMB, Infrastructure, Fintec and Wealth Management.

We look forward to introducing you to our delegates in Hong Kong and invite you to view their individual profiles in the following pages. Feel free to contact them directly or via <http://expatadvisorscommunity.com.au/aff2017/>

### Supporting Organisations:



# Delegates and Representatives

Name	Company	Industry Sectors	Location	Mission Delegate
Stacey Martin	Expatriate Advisors Community	Expatriate Services, SIV Consulting, professional referrals and project introductions.	Sydney	2013 to 2017
David Thomas	Think Global	China SME's & BRIC Consultant	Sydney	Delegation Leader 2010 to 2016
Steve Newnham	Financial Content Network	Boutique Funds, Investment Projects	Sydney	2017
Paul Resnick	Finametrica	Risk Profiling	Melbourne	2017
Vincent Lim	Sumo SIV	Managed Funds for HNWI investors and SIV Migration	Sydney	2017
Tomy Dormer	Kreston Dormers	Business strategy & past president of NSW Chamber of Commerce	Sydney	2017
Adam Goern	Farms and Finance	Agricultural Projects - matching in the food sector	Sydney	2016 & 2017
Carolyn Butler	Hong Kong Trust Company	Trust Services and Structures	Hong Kong	2017
Yvonne Lu	PWC	Consulting - China & Australia	Shanghai	2013 & 2017
Ben Weeding	BuySide	Property Buyers Agent for Expats	Sydney	2016
Stella Li	Silk Road Consulting	Investment Projects including property and agriculture	Sydney	n/a
Craig West	Succession Plus	Australian Businesses for Investment and sale	Sydney	n/a

## 2017 Mission Leader



### Stacey Martin, Strategic Connector and Founder, Expat Advisors Community

#### Background and expertise

Stacey Martin is known as a “Strategic Connector” with a passion for Aus-China business. With a wealth and investment advisory career spanning 20 years, Stacey provided personal financial advice to Australian expatriates and inbound investors under the Significant Investor Visa program.

The Expat Advisors Community is a network for professionals with internationally connected clients across financial services, legal, accounting cross-culture and and those with business interests in Asia..

#### Overview of services provided

Significant Investor Visa (SIV) Consulting, relationship management and professional services introductions, business and project matching.

#### Types of clients you work with

Financial Planners, migration agents and others looking to assist clients with SIV migration, and those interested in Aus-China business from market entry to investing in Australia delivered through a range of consultancies and strategic partnerships.

#### What you would like to achieve during the mission and who would like to connect with

Introductions to those looking to invest in Australia for a range of business and investment opportunities. Am also looking to gain further understanding of wealth management and advisory services in China and how Australia can assist with education, advice, asset allocation and risk management.

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## Mission Leader 2010 to 2016



### David Thomas, China Expert and BRIC Specialist

#### Background and expertise

David Thomas believes that every company, big or small, MUST have a China strategy. He travels from Asia to inspire, motivate and educate business leaders, entrepreneurs and investors around the world on the massive potential created by the rise of China, and he supports them on their journey to identify, build and facilitate long term business and investment relationships.

David's unique value lies in his ability to not only identify business trends, opportunities and challenges in China, but also his "hands on" experience from having worked on the ground for the past 30 years. He is therefore able to illustrate and enhance his presentations by including practical examples, case studies and anecdotes from his own personal experiences and stories.

Having worked with SMEs from many industry sectors (e.g. retail, professional and financial services, manufacturing, food, tourism, education, publishing, real estate, design and technology) David's experience and expertise is broad and deep. He regularly speaks at Conferences, Workshops, Seminars and Board Meetings to a wide range of audiences and industry sectors and tailors his presentations accordingly.

He regularly travels around China working with local partners and investors, as well as hosting Chinese delegations and missions of investors, SMEs and entrepreneurs around the world. He is President of the Australia China SME Association (ACSME).

#### Contact David Thomas

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**THINK GLOBAL**  
With David Thomas  
BRIC Expert

## 2017 Delegate



### **Steve Newnham, Head of Financial Services, Financial Content Network**

#### **Background and expertise**

Steve Newnham is a veteran of the Australian Funds Management industry having commenced his career at Bankers Trust in the late 1980's. Passionate about business, people and bringing them together to build long lasting relationships, Steve has been part of the growth and evolution of the Australian financial services industry.

Experience has been gained working with corporations and small businesses across funds management, life and general insurance, financial planning, marketing, legal, accounting, compliance and risk management, platforms, stockbroking, aged care and family offices. Steve is also a director of Jaipur Asset Management, a specialist fund manager focused on the Indian equities market.

#### **Overview of services provided**

Steve works with financial services businesses to create, develop, implement and manage mutually beneficial relationships. This involves fine tuning their client offerings, developing communication strategies for specific target markets, exploring networking opportunities to develop long term strategic alliances and implementing plans to maintain those relationships well into the future.

#### **Types of clients you work with**

Firms seeking funds under management and capital - including fund managers, financial services providers, businesses raising equity and debt funding, private and family owned businesses

Firms providing funding - including high net worth individuals, family offices, companies, financial advisers, lawyers, accountants, foundations and institutions. Recent deals include Australian and US property syndicates, business debt funds, mortgage funding, biofuels plant, credit fund, global equities manager, various agricultural projects, market research assignments, revamp of communication strategy of several niche fund providers and opening new markets for Indian equities fund management.

#### **What you would like to achieve during the mission and who would like to connect with**

Connect with financial services providers interested in building mutually beneficial relationships with Australian counterparts to develop distribution channels. Connect with investors looking for strategic investments in a range of funds, properties, businesses and agricultural projects.

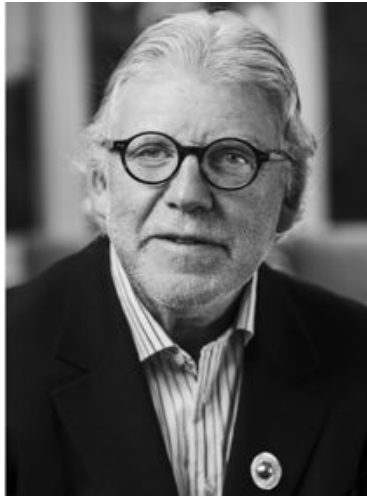
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## 2017 Delegate



### **Paul Resnik Co- founder, Director and Peripatetic Optimist**

#### **Background and expertise**

We provide tailorable and practical web based tools to help enterprises deliver 'best of breed' compliant, evidence based and academically defensible personal financial advice to their clients. We have been providing these services to enterprises around the world for almost 20 years. We integrate with other specialty service houses and together with PlanPlus we have multi currency, multi lingual and multi jurisdictional capabilities and a developed Chinese language platform.

#### **Overview of services provided**

We deliver personal financial planning tools, integration capabilities and training to enterprises so that they can readily apply a common and proven planning methodology to all their Advisory channels. We start at Robo advice with single goal needs and scale through all market segments up to family offices needing complex multi generational holistic applications.

#### **Types of clients you work with**

We work with Banks, life insurance companies, asset managers, pension funds, financial advisory firms and other providers of services to these business

#### **What you would like to achieve during the mission and who would like to connect with**

I'm keen to meet Chinese enterprises who are looking to provide comprehensive and scalable financial advice to their customers.

#### **Contact Paul Resnik**

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## 2017 Delegate



### Vincent Lim, Executive Director, Sumo SIV Pty Ltd

#### Background and expertise

Sumo SIV is the investment manager of the SUMO SIV Managed Fund and SUMO SIV Managed Fund No. 2, both of which are Significant Investor Visa (SIV) compliant managed funds registered by the Australian Securities & Investments Commission (ASIC).

Vincent is a trusted adviser to many high - net- worth individuals in Australia and across Asia. In addition to being a director at Sumo SIV, he is also a director at VTS Lawyers, a director of the general partner of the SmartMesh Innovation Fund, and a director of property funds management company, Jaxen Funds Management.

#### Overview of services provided

Sumo SIV and its related entities provide investment and funds management services in Australia which include SIV complying investments, property - related funds management (real estate investment and development ), lending to property developers and non-resident purchasers of Australian real estate.

#### Types of Clients you work with

High - net - worth individuals, family offices, investment companies and other fund managers (local and overseas).

#### What you would like to achieve during the mission and who would like to connect with

To connect with fund and investment managers and high-net-worth individuals (or their advisers) seeking SIV investment solutions and those seeking investment opportunities in Australia generally.

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## 2017 Delegate



### Tony Dormer Managing Director Kreston Dormers Pty Ltd

#### Background and expertise

Tony Dormer is the Managing Director of a multi-discipline business advisory firm that he established over 35 years ago. Tony's personal specialist skills are around taxation services, mergers and acquisitions as well as business development issues generally for small and medium sized entrepreneurs. His entrepreneurial style and ability to 'think outside the square', has enabled Kreston Dormers to provide clients with a level and style of service that is unique among business advisory and accountancy practices.

Since 2007 Tony has been a Board Member and Councillor with the NSW Business Chamber. Prior to his election as President in February 2014, he held the position of Deputy President as well as Chairman of the Audit and Compliance Committee, Chair of the Business Environment and Economics Committee within the NSW Business Chamber. He is presently the Immediate Past President.

#### Overview of services provided

Kreston Dormers provides business advisory, consulting and development, taxation and compliance, bookkeeping and financial planning. Our business advisory services include business planning; valuations in regards to selling, mergers and acquisitions; turnarounds and restructuring; and business succession. Our taxation services include assistance with general tax compliance, international tax, capital gains tax and complex taxation structures. We have XERO and MYOB certified bookkeepers who provide a full range of bookkeeping services at your premises or in the cloud.

#### Types of clients you work with

Our clients are generally small to medium enterprises with turnover of \$1million to \$50 million. Our clients are from all industry sectors as well high net worth individuals.

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## 2017 Delegate



**Adam Gregory Goern, Managing Director, TPA & Co**

### **Background and expertise**

"Australian Agribusiness Developer " is the role of TPA & Co. TPA invests in reliable compatible relationships to birth unique transactions between SME food business owners who control Australian supply production and China demand distribution.

### **Overview of services provided**

OPEN SESAME is a private "Introduction Network", social media brand and digital bridge that TPA built, owns and operates together with partners for clients. Australian food producers trade stories with Chinese distribution owners to introduce themselves online. Stories are anonymous to protect commercial interest and identity.

Agreement for direct communication online is an opportunity for two clients to decide if they want to exchange identity and contact information. The search process is:

STEP 1 - Story Exchange

STEP 2 - Questions & Answers

STEP 3 - Identity Exchange

Open Sesame - "Where Stories Introduce People"

[www.opensesame.asia](http://www.opensesame.asia)

### **Types of clients you work with**

- **Australia Food Supply** - Farmers, Primary Producers and Family-Owned SME niche food brands.
- **China Food Demand** - Owners of wholesale food distribution companies including supermarkets, strategic investment firms covering Family Offices, Private Equity and their individual portfolio companies.

**What you would like to achieve during the mission and who you would like to connect with**

Our key goals are to empower our next Australian clients as we grow the forecast story valuations listed on Open Sesame to A\$1 billion, and onboard our next "Relationship Manager." RMs use Open Sesame to broker private introductions.

We want to connect with " Early Adopters " sharing our vision - business partner search and match online is the next natural big jump forward across our interconnected commercial future.

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## 2017 Delegate



### **Carolyn Butler, Director & CEO, The Hong Kong Trust Company Limited**

#### **Background and expertise**

Carolyn has over 25 years' experience in a broad range of financial services, and has a deep knowledge of Asian markets having spent the past 20 years in Hong Kong.

The Hong Kong Trust Company provides compliance, accounting and back office services for investment and fund raising structures. This includes tax efficient succession and business expansion including into China.

#### **Overview of services provided**

Trusts, funds and private equity setup and administration, escrow services, collective investment schemes for investment and fund raising, company establishment, secretarial and compliance services, accounting and invoicing.

#### **Types of clients you work with**

Individuals, family offices, companies, intermediaries, lawyers, accountants, fund managers and private equity groups.

#### **What you would like to achieve during the mission and who would like to connect with**

Meet individuals and groups looking to expand to Asia requiring assistance in setting up in Hong Kong, China and Asia generally, and those requiring structures for fund raising for inward or outward bound investment

#### **Contact Carolyn Butler**

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## 2013 and 2017 Delegate



**Yvonne Lu, Manager, Consulting PwC**

### **Background and expertise**

Yvonne is currently a Manager in PwC's Consulting practice based in Shanghai. She has been working closely with the practice top management with a focus on the China & Hong Kong's "Clients and Markets" program in general and Retail & Consumer/Technology, Media & Telecom sectors in particular, dedicated to driving Consulting's strategy planning, program/project management, business development initiatives, and marketing campaigns from strategy to execution.

Prior to joining PwC, she spent significant time with KPMG Australia's China Business Practice and played an instrumental role in helping the leadership build up the practice infrastructure, develop the business, and advising clients on their cross-border investments and overseas expansions. Over the past 10 years professional career, she has developed broad networks with all kinds of businesses in a range of sectors and well understanding of doing business in the region . She holds Bachelor of Arts from Fudan University in China and is an executive MBA student of AGSM from UNSW in Australia.

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## 2016 Delegate



**Ben Weeding, Property Buyer, Buyside Buyer's Agency**

### **Background and expertise**

Ben is a former Institutional Equities Trader at highly regarded Investment Bank, JPMorgan. Despite his high-level exposure to the equity markets in Asia and around the world, Ben developed a keen interest in the Australian property market. Utilising his analytical skills, he went on to develop a substantial portfolio through his own renovations and developments. It was this success in the Australian property market that eventually led him away from his role as an equities trader to focus solely developing his own portfolio.

Ben has continued his journey back in Sydney, both as a renovator and developer, and now works as a Property Buyer at Buyside Buyer's Agency. He specialises in the purchase of residential and commercial property for investors in NSW and Queensland.

### **Overview of services provided**

Purchase of residential and commercial properties in NSW and Queensland, Property Portfolio construction, Education/Research services Proximity Restricted, Time-Poor, Retirement focussed, Families (as part of an investment), HNW investors

### **What you would like to achieve during the mission and who would like to connect with**

I would like to connect with expats looking to purchase investment property back in Australia as well as HNW individuals/companies looking to acquire value-added properties in Australia

### **Contact Ben Weeding**

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## Represented by Delegation Leader Stacey Martin



**Stella Li, Founder, Silk Road Consulting**

### **Background and expertise**

Stella Li grew up in Hunan Province, China before moving to Australia in 2010. With experience working in both China and Australia, Stella has a unique context in building bridges for Australia-China business opportunities.

Silk Road Consulting helps companies by undertaking market research to refine their strategy and access specialised market channels to help and facilitate successful business partnerships.

### **Overview of services provided**

China market entry strategies, facilitation of strategic partnerships between Chinese and Australian companies, investment opportunities for in Australia including property and Agriculture.

### **Types of clients you work with**

Australian SMEs, Chinese companies, High Net Worth individuals and families.

### **What you would like to achieve during the mission and who would like to connect with**

Silk Road Consulting currently represents a number of agricultural projects in Australia who will be seeking investors and strategic partners as part of their growth strategies.

### **Contact Stella Li**

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## Represented by Delegation Leader Stacey Martin



### Craig West, Founder and CEO of Succession Plus

#### Background and expertise

Craig West is a strategic business and financial mentor for mid-market business owners. With over 20 year's experience advising business owners, his background as a CPA has provided invaluable experience in the key issues of concern to business owners.

Craig is also the Executive Chairman of the SME Association of Australia, which is focused on improving the success of SME's in Australia.

#### Overview of services provided

Succession Plus works closely with baby-boomer business owners in mid-market businesses to help them design and implement an effective exit strategy - ensuring they maximize business value and achieve a successful exit.

#### Types of clients you work with

Business owners and their advisers - typically baby boomers with businesses ranging in value between \$5M and \$50M.

#### What you would like to achieve during the mission and who would like to connect with

Whilst unable to participate in the delegation this year, Succession Plus has a range of businesses that may be of interest to overseas investors.

#### Contact Craig West

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## Supporting Organisations

### [The Australian Trade Commission](#)

(Austrade) assists Australian businesses, education institutions, tourism operators, governments and citizens to develop international markets and promote international education, win productive foreign direct investment and strengthen Australia's tourism industry.



Australian Government

Australian Trade and Investment Commission



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### [The Hong Kong Trust Company Group](#)

Hong Kong Trust Company provides professional trusteeship, fiduciary services, fund and private equity administration and a full range of corporate, financial and accounting services for individuals, family offices, intermediaries, and corporations. Our structures and services provide support for trading, commercial and investment activities as well as the protection and management of international assets, wealth planning, estate management and tax structuring.



THE HONG KONG  
**TRUST  
COMPANY**  
GROUP

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## [The Australian Chamber of Commerce Hong Kong and Macau](#)

(AustCham Hong Kong & Macau) is the primary non-government vehicle for promoting Australian business interests by providing ongoing business development and networking opportunities. The Australian Chamber has over 1,500 members who are representatives of about 500 Australian and local companies within the Hong Kong business community.



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## [Hong Kong Trade and Development Council](#)

(HKTDC) – organises a broad spectrum of more than 330 trade fairs and promotional activities, 590 networking and outreach events, and receives some 640 trade missions each year, helping Hong Kong's small and medium-sized enterprises (SMEs) connect with business clients and partners around the world.



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## [Invest Hong Kong](#)

InvestHK was established in July 2000, with a vision is to strengthen Hong Kong's status as the leading international business location in Asia. Their mission is to attract and retain foreign direct investment which is of strategic importance to the economic development of Hong Kong.



**InvestHK**

The Government of the Hong Kong  
Special Administrative Region

Working with overseas and Mainland entrepreneurs, SMEs and multinationals that wish to set up an office or expand their existing businesses, InvestHK provides free advice and services to support companies from the planning stage right through to the launch and expansion of their business.

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[Think Global Consulting](#)



**THINK GLOBAL**  
With David Thomas  
BRIC Expert

Think Global Consulting facilitates business and investment between Asia and Australia.

Principal David Thomas works with individuals, entrepreneurs, companies and institutions to build viable, sustainable and powerful connections by leveraging networks and relationships in both developed and emerging markets.

Think Global has proven capability in providing unique access to senior decision-makers in Government and Industry across the Asia Pacific region. Clients engage Think Global for strategic advice on market entry and business development, having successfully managed investments sourced from Asia into a wide range of attractive sectors, including Agriculture, Resources, Education, Healthcare, Tourism, Renewable Energy, Technology, Property Development and Financial Services.

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